



**THE ESTATE PLANNING COUNCIL OF CLEVELAND**

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The Estate Planning Council of Cleveland is a proud recipient of the 2016 NAEPC Council of Excellence Award.

**SPEAKERS:** Kyle B. Gee and David M. Lenz  
**TOPIC:** Digital Assets and Electronic Wills: Tomorrow’s Estate Planning Is Here Today  
**DATE & TIME:** Wednesday, January 24, 2018 · 8:00 am – 9:30 am  
**LOCATION:** LaCentre Conference & Banquet Facility, 25777 Detroit Rd, Westlake, OH 44145

*This breakfast is sponsored by*



**About the Program**

In 2013, an Ohio judge admitted to probate a Will written and witnessed entirely on a Samsung galaxy tablet. Recently, techie entrepreneurs have sought to procure favorable legislation in various states that would modernize centuries-old will execution formalities. After years without statutory guidance on fiduciaries and digital assets, Governor Kasich signed the Revised Uniform Fiduciary Access to Digital Assets Act (“RUFADAA”) into law in Ohio in 2017.

This interactive presentation will use hypotheticals to illustrate how new technologies are presenting challenges to the traditional paper-based trusts and estates practice. It will explain the key features of Ohio’s version of RUFADAA and how to practically plan for and administer digital assets under the new law. It will also discuss factors leading to the creation of electronic wills, arguments for and against their recognition, Nevada’s 2017 controversial statute enabling electronic wills and trusts, and the Uniform Law Commission’s new electronic wills drafting committee.

**About the Speakers**

David M. Lenz and Kyle B. Gee are partners at the law firm of Schneider Smeltz Spieth Bell LLP whose practices focus on trusts and estates matters. They are frequent speakers on estate planning and technology topics and are involved in the Ohio State Bar Association committees reviewing proposed legislation in these areas.

Mr. Lenz is an OSBA Certified Specialist in Estate Planning, Trust, and Probate Law whose practice emphasizes preparing comprehensive plans to include not just tax and asset protection planning but often-overlooked items like digital assets and pets. He earned his J.D. *magna cum laude*, his B.S. in Economics, and his B.A. in Political Science from The Ohio State University.

Mr. Gee is licensed in Ohio, Pennsylvania, and New Jersey. The youngest of his four children won’t be able to create a will until year 2035! His experience as a law clerk to a busy Pennsylvania Orphans’ (Probate) Court Judge influences how he counsels clients on estate planning and dispute resolution. Mr. Gee earned his J.D. *magna cum laude* from The University of Toledo College of Law and his B.A. in Communications from Brigham Young University.

Elaine B. Eisner | 2017-2018 Program Chair

**Reservation Policy** – All attendees are encouraged to register in advance and walk-in reservations will be accepted on a space-available basis only. Meeting cost is \$25 for members *when paid in advance before noon 01/23/18*, \$40 for members at the door, \$40 for guests, and \$200 for a table of six (please submit names to [admin@epccleveland.org](mailto:admin@epccleveland.org) by 01/19/18). ***If you reserve and are unable to attend, please call the office to cancel by noon 01/23/18 to avoid a no-show reservation billing.***

**Continuing Education** – EPC Cleveland will *request* approval for this program from the CFP® Board of Standards for CFP® designation holders and from the Supreme Court of Ohio for Ohio attorneys to receive CLE credit. EPC Cleveland will also request credit from the Ohio Department of Insurance. A certificate of completion will be available for those CTFAs, CPAs, and CWS designees who feel the program satisfies their continuing education requirements.

**To Reserve –**  
Online: [www.epccleveland.org](http://www.epccleveland.org), Visit the “calendar” page, open the event & click “Register Now”  
Mail EPC: 1120 Chester Avenue, Ste. 470; Cleveland, OH 44114  
Fax EPC: Include your credit card number and return to (216) 696-2582.

NAME: \_\_\_\_\_

SECOND MEMBER or GUEST: \_\_\_\_\_

GUEST COMPANY: \_\_\_\_\_ GUEST EMAIL: \_\_\_\_\_

MEMBER PHONE: \_\_\_\_\_ GUEST PHONE: \_\_\_\_\_

Enclosed is \$ \_\_\_\_\_ ( \_\_\_ members @ \$25; \_\_\_ guests @ \$40; \_\_\_ table of 6 guests @ \$200) or

Charge my Visa / MasterCard / American Express \$ \_\_\_\_\_

# \_\_\_\_\_ Exp. \_\_\_\_\_

Signature \_\_\_\_\_

Reservation Form  
Jan 2018  
**Breakfast**